

*****This is only a preview of the examination questions. To take the actual examination, please go back to the official bulletin, and click the examination link at the bottom.*****

Training and Experience Evaluation

Investment Officer 2 & 3, Public Employees' Retirement System

The California civil service selection system is merit-based and eligibility for appointment is established through a formal examination process. This examination consists of a Training and Experience evaluation used to evaluate your education and experience relevant to the position.

This Training and Experience evaluation is a scored component accounting for 100% of your rating in the examination process. It is important to complete the questionnaire carefully and accurately. Your responses are subject to verification before appointment to a position.

VERY IMPORTANT: PLEASE READ THIS ENTIRE SECTION CAREFULLY.

If it is determined at any time that you have made any false or inaccurate representations in any of the information you have provided, you may be disqualified from this process, suffer loss of State employment, and/or suffer loss of right to compete in any future State of California hiring processes. You are solely responsible for the accuracy of the responses provided.

This warning has been provided to protect your rights as a job candidate as well as the rights of this department. Be advised that you are expected to answer truthfully and accurately.

Verification References

Provide references who can verify the information you provide in this exam. Prior to receiving an offer for employment, these references may be contacted to confirm that you have paid or unpaid experience pertaining to the duties and requirements listed in this exam. List all references that apply.

EMPLOYMENT

Job Reference 1

Job Title:

Organization Name and Address:

Date Worked: From: To:

Name of Person(s) Who Can Verify Your Job Responsibilities:

Contact Phone Number(s) of the above Individual(s):

Job Reference 2

Job Title:

Organization Name and Address:

Date Worked: From: To:

Name of Person(s) Who Can Verify Your Job Responsibilities:

Contact Phone Number(s) of the above Individual(s):

Job Reference 3

Job Title:

Organization Name and Address:

Date Worked: From: To:

Name of Person(s) Who Can Verify Your Job Responsibilities:

Contact Phone Number(s) of the above Individual(s):

Job Reference 4

Job Title:

Organization Name and Address:

Date Worked: From: To:

Name of Person(s) Who Can Verify Your Job Responsibilities:

Contact Phone Number(s) of the above Individual(s):

Job Reference 5

Job Title:

Investment Officer II & III
Training and Experience Evaluation Preview

Organization Name and Address:

Date Worked: From: To:

Name of Person(s) Who Can Verify Your Job Responsibilities:

Contact Phone Number(s) of the above Individual(s):

Job Reference 6

Job Title:

Organization Name and Address:

Date Worked: From: To:

Name of Person(s) Who Can Verify Your Job Responsibilities:

Contact Phone Number(s) of the above Individual(s):

EDUCATION

Education Reference 1

School Name and Address:

Degree(s) Earned:

Date(s) Attended: From: To:

Education Reference 2

School Name and Address:

Degree(s) Earned:

Date(s) Attended: From: To:

Education Reference 3

School Name and Address:

Degree(s) Earned:

Date(s) Attended: From: To:

Education Reference 4

School Name and Address:

Degree(s) Earned:

Date(s) Attended: From: To:

Section 1: Tasks

Instructions:

Rate your experience performing specific job-related tasks.

Respond to each of the following **statements** by indicating how the **statement** applies to you. You are required to respond to every question and provide relevant examples. Also, indicate the references who can verify the information provided.

In responding to each **statement**, you may refer to your WORK EXPERIENCE, whether paid or volunteer, and your EDUCATION.

PLEASE NOTE: This examination is designed to gain an overall assessment of your education and experience as it directly relates to the duties and the knowledge, skills and abilities required for this position. Possession of specific education is **not** required to be successful in this examination; however, such achievements may substitute for desirable levels of experience. All components of this examination have been carefully validated by tying them directly to job requirements and documenting their relevance to the position.

ITEM	TASK STATEMENT [SEE BELOW.]			
		TIME/DURATION:	QUALIFICATIONS:	REFERENCES:
EXPERIENCE	Describe your work experience relevant to performing <u>this task</u> , both paid and volunteer.	I have Choose an item. experience performing <u>this task</u> .	Provide relevant examples of the more complex work you have been responsible for that demonstrates your ability to perform <u>this task</u> (500 characters max): <div></div>	Identify the references who can verify this information: <input type="checkbox"/> job ref. 1 <input type="checkbox"/> job ref. 2 <input type="checkbox"/> job ref. 3 <input type="checkbox"/> job ref. 4
		I have performed <u>this task</u> Choose an item. times.		
EDUCATION	Describe your education relevant to performing <u>this task</u> .	I have completed Choose an item. units of college level courses directly related to performing <u>this task</u> .	List the courses you have taken which are relevant to performing <u>this task</u> and are verifiable on a transcript (500 characters max): <div></div>	Identify the university where this education was received: <input type="checkbox"/> educ. ref. 1 <input type="checkbox"/> educ. ref. 2 <input type="checkbox"/> educ. ref. 3 <input type="checkbox"/> educ. ref. 4

TASKS INCLUDED IN THE EXAM

Investment Officer 2 & 3 Items

ITEM #	
1	Analyzing and/or executing current/proposed transactions, trades, contracts, legal documents, portfolio characteristics, and/or fee structures to meet investment and/or financial objectives.
2	Facilitating meetings to collect and/or disseminate investment and/or financial information.
3	Preparing and delivering oral presentations to management and/or others (e.g., Investment Committee, internal and external interest groups) to disseminate investment and/or financial information.
4	Preparing written reports for various individuals (management, Investment Committee, internal and external interest groups and others) to disseminate investment and/or financial information.
5	Gathering and disseminating investment/financial information from a wide variety of sources to meet investment and/or financial objectives.
6	Analyzing information from a wide variety of sources to obtain knowledge of investment market conditions and/or trends to meet investment and/or financial objectives.
7	Making recommendations for investment strategies and/or assets/securities to meet investment and/or financial objectives.
8	Developing policies and/or procedures to implement, monitor and/or support an investment strategy or process.

Investment Officer 3 Item Only

ITEM #	
9.	Representing the department and/or organization at various meetings, conferences, advisory boards and committees as needed to collect and/or disseminate investment and/or financial information.